

## **Coeur Group Corporate Profile**

### ***Coeur Business Group, Inc.***

Coeur Group focuses on providing clients with value investment, risk reduction, and asset leverage strategies through portfolio accretion and governance methods for effective utilization of technology assets. Coeur Group combines best in class methodologies, frameworks, tools, and industry-leading knowledge experts to help clients build technology innovation strategies that increase performance, align assets with business requirements, maximize return on investment, and foster clear, sustainable competitive advantage.

Coeur Group provides customized project consulting services for large organizations with complex IT requirements. Coeur Group offers a continuum of high-value services focused on assisting clients develop business, technology, and organizational strategies. Our approach to supporting the resolution of business and technology problems for our clients is based on a collaborative approach utilizing proven methodologies, senior experienced talent, and relationship management at the forefront of the engagement effort. Coeur Group's senior industry consultants have served hundreds of large government and corporate clients who depend on their analysis and recommendations to develop and employ strategies for selecting, financing, and implementing and managing information technology.

Our engagement teams are selected to provide the highest levels of project consulting services to information technology executives and managers, who must leverage technology to meet business requirements. Recommendations to clients are based on projection and analysis of important events and announcements, key issues, technologies, products and services, business practices, and industry trends. Coeur Group offers Executive-to-Executive guidance during our projects and provides maximum knowledge transfer as an underlying approach to our consulting.

### ***Organization and Industry Focus***

Coeur Group provides industry focus in four areas: Government Innovation, Health Care, Financial Services, and Innovation and Commercialization.

We have services that provide IT to business alignment, cost effective operations of Information Technology, strategic organizational innovation, and agility as well as cost savings programs. Specifically for state governments and research institutions, we provide a methodology for development of non-tax-based revenue streams. This methodology provides a systematic approach for enabling collaboration, identifying key research assets with high commercial value, and developing credible business opportunities, all to increase returns for the states' stakeholders.

### ***Coeur Group's Practices***

Our consulting practices are organized in four vertical markets, which include:

**Government Innovation Practice:** Support of local, state and federal government organizations to provide innovative approaches to value sourcing strategies, governance of assets and project investments, and utilization of technology, including an innovation to commercialization process for development of non-tax-based revenue streams.

**Financial Services Strategies Practice:** Providing critical business and technology alignment through strategy, organizational development, and architectural planning. Creating strategies for development of enterprise resource planning capabilities, customer relationship management, and channel development.

**Healthcare Strategies Practice:** Developing operational excellence for healthcare industry clients, including hospital groups and health care insurance provider networks. Specializing in

technology investment funding processes and governance, with value performance scorecard integration.

**Innovation Commercialization Practice:** Utilizing a proprietary and industry-leading Lab to Market methodology to increase the velocity of developing and commercializing research and technology innovations. This methodology (focused primarily on public sector and research institutions) provides a systematic approach for enabling collaboration, identifying key research and technology assets with high commercial value, and developing credible business opportunities, all for increasing returns for stakeholders.

***Mission Statement:***

**What we do!**

Coeur Group enables and supports our client's efforts in reducing risk and capturing value from technology investments.

**How we do it!**

“Providing clients with Business Transformation capabilities through *Portfolio Investment Management* programs, cost reduction strategies, human capital management, and governance structures.”

Coeur Group's business model is focused on providing executive-to-executive guidance by bringing years of business cycle experience, utilization and development of “Best Practices”, implementation of successful business transformations, and real world, relevant, actionable recommendations for gaining immediate and long term competitive advantages and cost effectiveness.

## **Selected Coeur Group Consultant Organizational Engagements**

**Client Profile:** State of Connecticut

**Critical Issue:** The state's IT organization had previously made a decision to outsource the entire IT function to EDS. During final negotiations it was determined that the relationship would not be acceptable and cancelled the deal. The State CIO was in need of a new organization structure which would address the needs of the departments and align IT strategy with the states direction and support requirements.

**How our consultants helped:** The State of Connecticut CIO needed an entirely new IT organization structure due to the previous plan to align to the outsourcing vendor's organization model. Our consultants interviewed key legislators, state agencies and IT management and staff to define the strategic business information requirements of the states agencies and constituents. Critical issues were defined and the client was provided with impact/risk findings as well as actionable recommendations for immediate implementation. A new organization model was defined, validated, and accepted for implementation. A Transformation plan complete with performance measures and value scorecard were defined for the new IT organization. Additionally, at the request of the CIO, our consultants provided job descriptions for a new management team, interviewed candidates, and defined qualified candidates for the CIO's final selection.

**Client Profile:** Largest Regulated Financial Institution in the State of Texas

**Back Ground:** The bank had failed its annual Office of Thrift Supervision (OTS) audit, subsequently dropping its A+ rating to a C rating.

**Critical Issue:** Failure to pass the OTS audit was based on failure of the Information Technology organization regarding management capability, operational process readiness, and lack of project and budget governance.

**How our consultants helped:** Reporting directly to the President of the Bank, our team provided a complete assessment of all aspects of the Information Technology organization, including operations, project management and governance, architecture, infrastructure, business alignment, disaster preparedness, security capability and relationship management. All functions were interviewed and assessed by individual for capabilities and competencies. Senior staff management plus the CIO were reviewed to determine future leadership capabilities. Key recommendations included specific changes in management including the CIO, IT Security, and infrastructure management. The President immediately implemented the changes as part of the banks "get well" plan. The resultant plan regained the bank its coveted A+ rating within 9 months.

**Client Profile:** City of Kansas City

**Background:** The City was embarking on a citywide competitive plan and strategy. The Information Technology organization did not have a strategy for aligning with the city departments, constituents, and business requirements. Automation of processes was a major focus of gaining competitive advantage for the city's cost structure.

**Critical Issue:** The Information Technology organization had not kept pace with the demands of many city departments and could not justify funding for business required systems and applications. Critical Enterprise Departments (those with revenue-producing capabilities) were critical of the lack of support from the IT organization and had started to develop their own IT structure of support.

**How our consultants helped:** Instituted a "Value Perception survey" to define critical relationship, perception, and value issues between the departments and the Information Technology organization. Immediately developed a CIO success agenda to provide critical relationship and business issue management, resolving tensions between the parties involved. Conducted an 8 city survey to determine what competing cities were implementing or planning for technology and investment plans. Provided a complete Information Technology strategy covering the key "Strategic Pathways" for the city's use of technology which included: Architecture, IT operations, IT organization, infrastructure, project and portfolio management, and governance. The result was a collaborative plan between the city departments and the CIO. The CIO was subsequently promoted to assistant city manager level, the affected departments fully supported the IT strategy and became involved in the Enterprise Steering Committee for technology investment and funding, utilizing a value scorecard approach.

**Client Profile:** U.S. Department of Energy

**Background:** The Department of Energy was looking to move quickly forward with programs to attract private firms to utilize the Laboratory in developing their research and commercialization ventures. New applications and systems were required to be operational in a short timeframe to provide commercial clients with a baseline-computing environment.

**Critical Issue:** The Information Technology Department of the Lab was losing credibility with the departmental management, and funding was being reduced for IT and held in the departments due to lack of past project completions and failure to achieve user expectations. The CIO determined immediate and significant changes were required in their methods of project approvals, organization, and the ability to save current year costs while measuring returns on all technology investments. Morale of the Project Managers and IT staff was at an all time low.

**How our consultants helped:** Assessed the current information technology organization. Defined gaps in relationship management, project management capabilities and governance processes. Established a formal Project Management Office with executive alignment, planning, and controls for major projects. Re-trained and assigned dedicated project managers. Developed Organization template, complete with high-level job descriptions. Redefined the budget and project approval processes, gaining significant Departmental business management support. Developed "Value Calculators" that determined IT investment value gained during project implementation and identified significant savings in the immediate budget cycle. Initial year savings were in the range of \$36 M. across all Lab departments.

**Client profile:** U.S. Department of Transportation

**Background:** The department required a formal business and technology alignment plan to provide clear direction for budget request to Capitol Hill.

**Critical issue:** Current IT programs were not coordinated across department agencies, and the value was not understood or measurable from the Agency Director's viewpoint. Recent executive orders required detailed program investment review prior to funding appropriations.

**How our consultants helped:** Coeur Group consultants provided an assessment of the department's critical business processes, architecture and organizational credibility and capabilities. Coeur Group's consultants then developed specific technology portfolios based on defined Strategic Pathways™ and provided prioritization of the projects and recommendations for leverage, redirections of funding and innovation to enable the department's agencies to gain competitive and security advantages across functions. Our consultants develop an organizational construct and measurement framework for project and program management that would support improvement in the performance of large, client-run IT programs. Our Enterprise Portfolio Management (EPfM) expertise, combined with the application of our evolving EPfM model, allowed us to identify the core management issues confronting the CIO, and develop a measurement framework that, while consistent with General Accounting Office measurement and best practices, was customized to address the specific measurement needs of the client. Our framework succeeded in enabling the Agency Director to have a finalized budget, present critical program goals and requirements, and gain funding allocations from Congress.

**Client Profile:** A Large Municipality (Work in Progress)

**Background:** The municipality was looking to save significant cost regarding technology investments. A focus on consolidation of IT resources across 20 departments was determined as a critical initiative to be undertaken by all departments. The CIO and Municipal Executives believed a consolidation strategy reasonable to undertake. The executives believed immediate cost savings were possible but required an unbiased viewpoint and a proven method of aiding in the consolidation effort.

**Critical Issue:** Over a periods of years the Information Technology organization had not kept pace with the demands of many city departments and could not justify funding for business required systems and applications. Critical Enterprise Departments (those with revenue-producing capabilities) were critical of the lack of support from the IT organization and had started to develop their own IT structure of support. Recent changes in strategy by the CIO had gained significant value from IT investments and the IT organization had become known as a Value Asset for the City. What remained was to consolidate all distributed technology resources to reduce cost and prioritize all technology investments.

**How our consultants helped:** Coeur Group provided an assessment and implementation plan for centralizing the IT organization across 20 departments. Coeur Group consultants provided an assessment of the department's critical business processes, architecture and organizational credibility and capabilities. Coeur Group's consultants then developed specific organizational models which would provide the most effective utilization of technology resources. Assessment of individual job functions was assessed in conjunction with the Human Resources department. Resource identification and categorization provided clear functionality capabilities for business process support. Our consultants develop an organizational construct and measurement

framework and recommended improvements for each IT function. A final organization construct was agreed upon by the executive sponsor and the Coeur Group. Recommendations for transition were implemented successfully. This engagement is still in process and is currently preparing to rollout phase two of consolidation according to the Coeur Group transition plan.